

**February 24, 2018**

**Plaza Midwood Merchants Association**

**Hosted by City of Charlotte Housing & Neighborhood Services at**

**Goodwill Opportunity Campus**

# Plaza Midwood Merchants Association

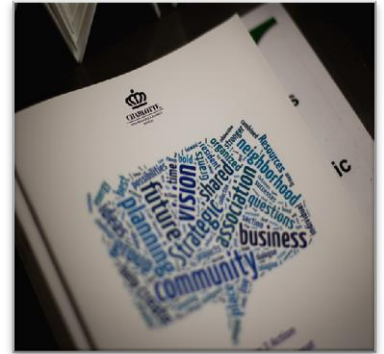
## 2018 Board Retreat

### Background

On Saturday, February 24, 2018, the board members of the Plaza Midwood Merchants Association participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at the Goodwill Opportunity Campus. The following board members and/or community members participated in the retreat:

Clifton Castelloe  
Jason Michel  
Caitlin Sellers

Gregg Hill  
Mike Libretto



The City of Charlotte values citizen leadership and its ability to make an impact in the communities, in which we all live, work, play and shop. With this in mind, the board retreat process was initiated to help neighborhood-based organizations develop strategic plans to improve quality of life in their communities.

### Purpose

The purpose of the board retreat was to

- Generate meaningful conversations around improving quality of life in our community
- Set clear goals and priorities for the upcoming year(s)
- Develop a vision and strategic priorities for our community

### Process

Our board retreat was conducted by trained facilitators tasked to keep our conversations on-task, productive, and focused on achievable objectives. The process was designed to help capture the best of the past, the best of the present, and how we can add to our strengths to build a better future. The focus was:

- Developing a vision to guide our decision making and activities
- Developing strategic priorities that aligned with our vision
- Developing project ideas

The agenda for the day was as follows:

- Introductions
- Where Have We Been? Where Are We Going?: Arrow Activity
- Where We Want to Be: Vision Statement Exercise
- Seeing the Forest through the Trees: Developing Strategic Priorities
- Working Lunch – The Year Ahead
- Idea Development – Time for participants to develop an action plan for goal achievement

## Where Are We Going, Where Have We Been?

We began our day with paired interviews using the “Where Are We Going, Where Have We Been?” activity. The activity was intended to help us reflect on:

- What we value
- What are the best things about our community and the people who live here
- What are our past successes
- Where are the potentials and possibilities

After interviewing our partners we shared our discussion with the group, finding commonalities in our conversations.

<b>Where We Were:</b> Reflecting on our past, what were some of the best/worst moments?	<b>Where We Are:</b> Why would or wouldn't a person/business want to move into our community?	<b>Where We Want to Be:</b> If you could make 3 wishes to make our community flourish, what would they be?
<ul style="list-style-type: none"> <li>• Stagnant/dysfunctional – lack of motivation or involvement; “what can you do for me” sentiments</li> <li>• Defensive towards change – fear of losing unique identity</li> <li>• No clear mission for PMMA</li> <li>• Apathy around involvement</li> <li>• Cliques/territory-based behavior</li> </ul>	<ul style="list-style-type: none"> <li>• Intentional focus on correcting dysfunction               <ul style="list-style-type: none"> <li>○ Common goals</li> <li>○ Plaza Midwood belong to all of us</li> </ul> </li> <li>• Breaking down “old school” / “new school” divide</li> <li>• Clarity of vision/purpose</li> <li>• Communication – work is done by collective – not attached to one person’s leadership</li> <li>• Parking is limited</li> <li>• Perception of safety issues</li> <li>• “Merchant Meet Ups” – the first one was very successful</li> </ul>	<ul style="list-style-type: none"> <li>• Manage work – don’t spread too thin; small accomplishments; can scale up</li> <li>• Unify neighborhood(s) – clarity around association being for neighbors without small business</li> <li>• Keep brick and mortar merchants a priority – supporting existing businesses through growing commerce</li> <li>• Increase number of people/merchants involved in Association</li> <li>• Promote existing business will help increase revenue</li> <li>• Speak as a united voice – vision and platform (political forums, re/development decisions)</li> <li>• Engage merchants who have a reputation of being territorial/difficult/about self-interest</li> <li>• Protect/value the architectural uniqueness</li> <li>• Maximize the value of long-term merchants and property owners in manner they feel valued and feel it is worth their time – action/implementation of ideas</li> </ul>

## Our Vision

Our vision is the unifying statement for our community that will guide our decision making and reminds us of what we are trying to reach. It is based on our shared values and preferences for our community's future. It combines the best of what was, what is, and what could be.

### OUR VISION:

*Together leading progress while  
protecting the soul from which  
we grow*

## Strategic Priorities

After committing to a shared vision, the board began to brainstorm on strategic priorities. This is where we began to define what is most important to us in order to achieve our vision. Strategic priorities are initiatives that will help us move closer to our vision of our community. The idea is to focus on a few things and do them very well as opposed to many things and missing the mark.

We started out thinking big and then narrowed down our focus using the Affinity Mapping Process, detailed below:

- Grab some sticky notes from the table. Keeping the vision statement in mind, write down as many of the following as you can think of, one per sticky note:
  - Current action items getting you closer to our vision.
  - Possible priorities/actions items to get us closer to our vision.
- Place the sticky notes on the wall.
- Organize the ideas by natural categories, once everyone agrees on the groups, give each one a name.



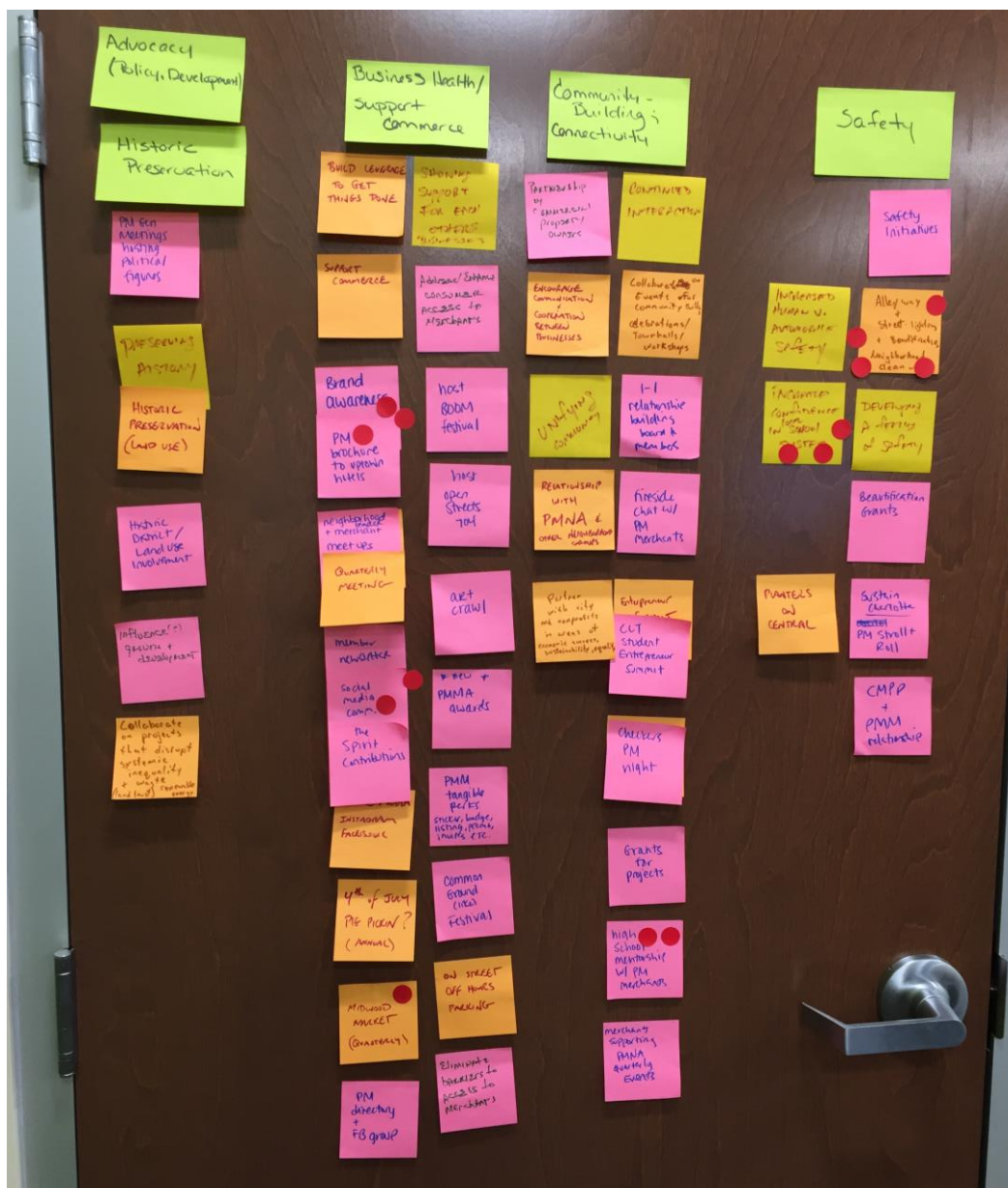
This activity led us to the following categories and action items being identified as important within our community:

- Community Building and Connectivity
  - High school mentorship with Plaza Midwood Merchants
  - Partnership with commercial property owners
  - Continued interaction
  - Encourage communication and cooperation between businesses
  - Collaborate on events for community building—celebrations/townhalls/workshops
  - 1-1 relationship building—board and members
  - Unifying community
  - Relationship with Plaza Midwood Neighborhood Association and other neighborhood groups
  - Fireside chat with Plaza Midwood merchants
  - Partner with City and nonprofits in areas of economic success, sustainability, equality
  - Charlotte Student Entrepreneur Summit
  - Checkers Plaza Midwood Night
  - Grants for projects
  - Merchants supporting Plaza Midwood Neighborhood Association quarterly events
- Business Health/Support Commerce
  - Brand awareness
  - Plaza Midwood brochure to Uptown hotels
  - Social media communications
  - Midwood Market (quarterly)
  - Build leverage to get things done
  - Showing support for each other's businesses
  - Support commerce
  - Address/enhance consumer access to merchants
  - Host BOOM festival
  - Host Open Streets 704
  - Neighborhood leader and merchant meet-ups / quarterly meetings
  - Member newsletter
  - Art crawl
  - New and PMMA awards
  - The spirit contributions
  - Social media, Instagram, Facebook
  - PMMA tangible perks – sticker, badge, listing, promo, invites, etc.
  - Common Ground (like) Festival
  - On-street, off-hours parking
  - 4<sup>th</sup> of July pig pickin (annual)
  - Plaza Midwood directory and Facebook group
  - Eliminate barriers to access to merchants
- Advocacy (Policy/Development) / Historic Preservation
  - Plaza Midwood meetings hosting political figures
  - Preserving history / historic preservation (land use)
  - Historic district / land use involvement
  - Influence growth and development
- Safety
  - Alleyway / street lighting / beautification / neighborhood clean-up
  - Increase confidence in local school system
  - Increased human vs. automobile safety

- Safety initiatives
- Developing a feeling of safety
- Beautification grants
- Partners on central
- Sustain Charlotte / Plaza Midwood Stroll and Roll
- CMPD and Plaza Midwood Merchants relationship

Each participant was provided three (3) stickers to be used for voting. Stickers could be placed all on one or two items or shared amongst all of the ideas identified. The three categories receiving the most votes are the strategic priorities that are most important for us to begin working on to achieve our vision. Within these three categories, there were three activities selected as most impactful toward achieving our strategic priorities.

The strategic priorities and activities are summarized on the following page.





## 2018 Neighborhood Board Retreat Summary

### *Plaza Midwood Merchants Association*

#### OUR VISION:

*Together leading progress while protecting  
the soul from which we grow*

#### TO HELP US REACH OUR VISION; WE WILL FOCUS ON THREE STRATEGIC PRIORITIES:

1

Safety

2

Business Health / Support  
Commerce

3

Community-Building and  
Connectivity

#### IN 2018-2019, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

Complete a public  
safety project in an  
alleyway or in  
connection with  
improved/increased  
street lighting.

Increase social  
media presence,  
create a PMMA  
brochure for  
Uptown hotels, and  
establish a  
recurring Midwood  
Market.

Create a high school  
mentorship program.



**Resources to Get Started-** You’ve rolled up your sleeves and established your vision. We have compiled resources that may assist your organization in achieving your goals on our Neighborhood Training Programs and Resources [website](#). We have identified resource categories that may be applicable to your projects below; please do not hesitate to explore more categories as you undertake your work! Links and contact information are provided for information only and are subject to change.

Project	Potential Resource Categories of Interest
<b>Complete a public safety project in an alleyway or in connection with improved/increased street lighting.</b>	Public Safety
<b>Increase social media presence, create a PMMA brochure for Uptown hotels, and establish a Midwood Market.</b>	Communication
<b>Create a high school mentorship program.</b>	Partnerships; Youth & Education

Your community is located within Charlotte’s Northeast Service Area. Your staff contacts for following up and community assistance are:

Charlenea Duncan, Northeast Community Engagement Liaison	John Short, Northeast Community Engagement Manager
<a href="mailto:csduncan@charlottenc.gov">csduncan@charlottenc.gov</a> or 704-336-2173	<a href="mailto:jshort@charlottenc.gov">jshort@charlottenc.gov</a> or 704-336-3862



